

KENTUCKY TRANSPORTATION CABINET

Kentucky TRNS*PORT Information Series

SiteManager Construction Module

Event Dates

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This module contains information on the Default Checklist Events window, Checklist Scheduled Events window, and the Checklist Events Dates window in SiteManager.

DEFAULT CHECKLIST EVENTS WINDOW

Navigation

Main Panel \ Contract Administration \ Reference Tables \ Default Checklist Events

General Description

Default Checklist Events is a reference table that needs to be populated in order for the Checklist Scheduled Events and Checklist Event Dates to be populated.

The Checklist Event types are defined by the transportation agency in the system code tables.

The Default Checklist Events panel lets the user add, modify, and delete the default Checklist Events. On the Default Checklist Events panel, the user can add pre-defined Checklist Event types to the default list. SiteManager adds the default Checklist Events automatically to each new Contract. The main purpose of a Checklist Event is to schedule an event that occurs more than once or at regular intervals, and to notify personnel when a date arrives and an action (e.g. approval) has not occurred.

Modifications made to the Default Checklist Events window will not affect the Checklist Events associated with contracts that were previously activated

Procedure

KYTC will not use this window in the Civil Rights area.

Field Table

Field Name	KYTC Population Policy & Procedure
Event Type	Kentucky Transportation Cabinet-defined code representing a type of event (e.g. bonding verified, DBE commitment verified, and Final Inspection Completed).

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Field Name	KYTC Population Policy & Procedure
Fed/State/Prov Ind	Select the Federal/State indicator as indicated in the Event Dates table below. This is a required field.
Event Group Type	Select the Event Group Type. This is a required field.
Required Doc Type	KYTC will not use this field.
Frequency Type	Select the frequency with which the event occurs (e.g. Daily, Weekly, Bi-Weekly, Monthly, Quarterly, Semi-Annually, Annually, and One Time Only). This is a required field.
Event Day	Enter the day of the Event. For weekly and bi-weekly events, the day of the week (01-07) the events are to occur. For monthly events, the day of the month (01-30) they are to occur. This field is protected for all other frequency types.
Distribution List	Add the Distribution List as indicated in the Event Dates table below.
Message Text	Add the Message Text as indicated in the Event Dates table below.
External Indicator	Indicates that a document is due to be received from an external source. KYTC will not use this field.
Required to Activate	Indicates that the event must occur before the Contract status can be changed from Pending to Active. Only events with a frequency of One Time Only can be Required to Activate. An event type cannot be both Required to Activate and associated with a Discrepancy. If one of these fields is checked, the other field is protected. This field is protected if the Contract is already active.
Discrepancy Indicator	Indicates that if the event has not occurred by the time of estimate generation, this event is noted as a Discrepancy. An event type cannot be both Required to Activate and associated with a Discrepancy. If one of these fields is checked, the other field is protected.
Recipient User ID	The User ID of a person to be notified when the Checklist Event's projected date expires and the actual date is not entered. Either a Distribution List or Recipient field must be entered. After a valid entry in either field, the other field is protected.

Default Checklist Event Types

Following is a table that includes the Default Checklist Events

Contractor's Evaluation	2
Erosion Control	3
Materials Check Done.....	3
FHWA 47	4

Field Name/Role	Description
Key Date Type	Contractor's Evaluation
Project Type (F/S)	Federal and State

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Field Name/Role	Description
Event Group Type	Contractor's Evaluation
Required Doc Type	N/A
Frequency Type	Annually - Every 31 st of December and at the end of the job
Event Day	N/A
Distribution List	N/A
Message Text	N/A
Recipient User ID	N/A
External Indicator	N/A
Required to Activate	N/A
Discrepancy Indicator	Yes
Key Date Type	Erosion Control
Project Type (F/S)	Federal and State
Event Group Type	Erosion Control
Required Doc Type	N/A
Frequency Type	Weekly - If it has Erosion Control on the job or if there is a tenth of an inch of rain
Event Day	2
Distribution List	N/A
Message Text	N/A
Recipient User ID	N/A
External Indicator	N/A
Required to Activate	N/A
Discrepancy Indicator	Yes
Event Type	Materials Check Done
Project Type (F/S)	Federal and State
Event Group Type	Materials
Required Doc Type	N/A
Frequency Type	One Time Only
Event Day	N/A
Distribution List	N/A
Message Text	N/A
Recipient User ID	N/A
External Indicator	N/A
Required to Activate	N/A
Discrepancy Indicator	Yes

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Field Name/Role	Description
Key Date Type	FHWA 47
Project Type (F/S)	Federal
Event Group Type	FHWA 47
Required Doc Type	N/A
Frequency Type	One Time Only - Form contractor is required to give KYTC. Record the date the form is received.
Event Day	N/A
Distribution List	N/A
Message Text	N/A
Recipient User ID	N/A
External Indicator	N/A
Required to Activate	N/A
Discrepancy Indicator	Yes

CHECKLIST SCHEDULED EVENTS WINDOW

Navigation

Main Panel \ Contract Administration \ Contract Records \ Checklist Scheduled Events

General Description

The Checklist Scheduled Events panel lists the scheduled events for the selected Contract. SiteManager adds a set of default Checklist Events automatically to each new Contract. The user creates the Checklist Event schedule on this panel. The user can add, modify, and delete the Checklist Events.

- When an event is scheduled on this panel, a subsequent batch process creates a record for each projected date.
- After the batch process runs, the user can record the Actual Date of each occurrence of an event on the Checklist Event Dates panel
- The batch process notifies the recipient(s) when a Checklist Event is overdue (estimate discrepancy and In Box Message).

Procedure

KYTC will use this window to create the checklist event schedule.

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All default checklist events will appear for the contract when the contract is loaded into SiteManager. As part of the Contract Activation process, the District personnel will perform the following functions:

- Delete Checklist Event Dates that do not apply for the contract.
- Enter the Next Projected Date. If nothing is entered, SiteManager will enter then next logical date after the Notice to Proceed Date. A Next Projected Date should be entered for all One Time Only or Annual events.
- Enter the Number of Occurrences as 999 or the number of times the event should occur during the contract. (Ex. If a contract lasts two years and the event frequency is 'Annually', then '2' should be entered in the Number of Occurrences field.)
- Enter the appropriate distribution list.

Field Table

Field Name	KYTC Population Policy & Procedure
Contract ID	Kentucky Transportation Cabinet-defined ID for the Contract.
Event Type	Kentucky Transportation Cabinet -defined type of event The Event Type is a required field and should be unique within the Contract. After the record is saved, this field is protected.
Event Group Type	A grouping of associated event types (e.g., EEO, Training, or Certification). This is a required field. - Select the Event Group Type.
Frequency Type	For repetitive events, the frequency with which those events occur (i.e., Daily, Weekly, Biweekly, Monthly, Quarterly, Semi-Annually, or Annually). One Time Only is for non-repetitive events. This is a required field. - Select the frequency with which the event occurs.
Event Day	Enter the day of the Event. For weekly and bi-weekly events, the day of the week (01-07) the events are to occur. For monthly events, the day of the month (01-30) they are to occur. This field is protected for all other frequency types.
Milestone No.	Identifies a milestone number within the Contract. - KYTC will not be using this field.
Next Proj Date	Enter the next target date for the repetitive event to occur. For a new checklist event, it is the first occurrence date.
Nbr of Occurrences	Enter the number of times the event is scheduled to occur in the specified frequency type. If the frequency type is 'One Time Only' this field will default to 1.

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Field Name	KYTC Population Policy & Procedure
Required Doc Type	Transportation agency-defined codes identifying the type of document when an external document is expected (e.g., Trainee report, EEO report, Material Certification). This is a required field when the External Indicator is checked. - KYTC will not be using this field
Distribution List	Add the Distribution List as indicated in the Event Dates table above.
Message Text	Add the Message Text as indicated in the Event Dates table above.
Required to Activate	Indicates that the event must occur before the Contract status can be changed from Pending to Active. Only events with a frequency of One Time Only can be Required to Activate. An event type cannot be both Required to Activate and associated with a Discrepancy. If one of these fields is checked, the other field is protected. This field is protected if the Contract is already active.
Discrepancy	Indicates that if the event has not occurred by the time of estimate generation, this event is noted as a Discrepancy. An event type cannot be both Required to Activate and associated with a Discrepancy. If one of these fields is checked, the other field is protected.
External Indicator	Indicates that a document is expected to be received from an external source. A valid Document Type must be entered when this field is checked. - KYTC will not be using this field.
Recipient	The User ID of a person to be notified when the Checklist Event's projected date expires and the actual date is not entered. Either a Distribution List or Recipient field must be entered. After a valid entry in either field, the other field is protected.

CHECKLIST EVENT DATES WINDOW

Navigation

Main Panel \ Contract Administration \ Contract Records \ Checklist Event Dates

General Description

The Checklist Event Dates panel lists the scheduled events for the selected Contract. The data shows a chronological history of each occurrence of a repetitive scheduled event, and the Actual Date recorded by the user for each occurrence. This panel lets the user record the actual dates of the Checklist Scheduled Events, and add or delete Checklist Event Date records.

Procedure

KYTC will not use this window in the Civil Rights area.

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Field Table

Field Name	KYTC Population Policy & Procedure
Projected Date	Enter the projected date. The date the event is targeted to occur. This field is protected after the record is saved. When entered, the date must be in the future and cannot be greater than next projected date. For a new row default to Next Proj Date.
Actual Date	Enter the actual date the event occurred. The date the event actually occurs, protected when external indicator is checked. When entered, the date must be current or in the past.
Comments	Enter any applicable comments.